DEBTOR ATTORNEY USER GUIDE

DocLink™

BMS
Bankruptcy Management Solutions

CONTENTS

Welcome to DocLink™!

DocLink is an online web-product provided by BMS, Inc., which allows Debtor Attorney(s) to upload required 341(a) documents in a paperless format to Trustees. **DocLink alleviates the necessity for the Debtor Attorney to handle multiple emails or track paper faxes, thereby streamlining the 341(a) process for all parties.**

This manual is intended to assist you in the use and navigation of the DocLink website. Further information and answers to questions may be found in the Frequently Asked Questions (FAQ's) on the website, https://doclink.bms7.com.

Do you have the right version of this manual? BMS publishes manuals for DocLink specified to the unique needs of the three following user types:

- DocLink for Trustees
- DocLink for Debtor Attorneys
- DocLink for Trustees who also act as Debtor Attorneys

If you require a different version of this manual, please download the correct version at the DocLink Website, https://doclink.bms7.com.

GETTING STARTED

1.0 REGISTRATION AND LOGIN

1.1 REGISTRATION

The registration process for Debtor Attorneys is initiated by a Trustee who is using DocLink. When a Trustee using DocLink first registers the Debtor Attorney as a user, the DocLink system will automatically email a "registration key" to the Debtor Attorney. This will allow the Debtor Attorney to begin the registration process.

- The email is sent from DocLink@bmsinc-service.com. If you have a spam filter, be sure to check your junk or spam email folders.

Follow these steps to register with DocLink once you have received your Registration Key email. You will only need to complete this entire process the first time you register with DocLink.

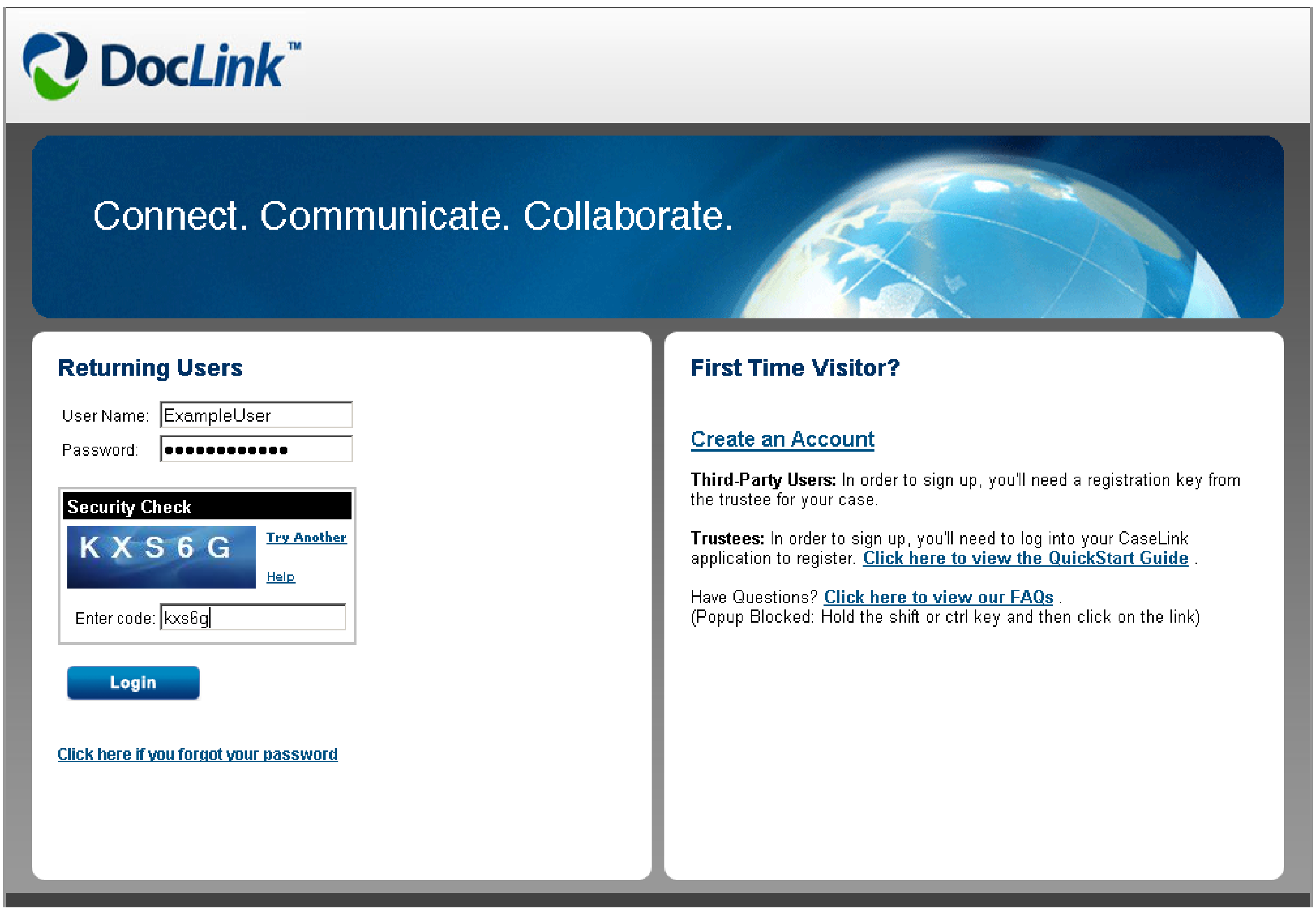
1. Access DocLink via the internet by navigating to https://doclink.bms7.com.
2. Create an account profile using the Registration Key.
3. Enter your full name.
4. Enter a unique user name.
5. Enter your email address to which the Trustee sent your Registration Key and confirm the email address.
6. Create a password that is between 6 and 20 digits long and contains at least one numeric digit.
   - *Passwords are case sensitive.*
7. Enter the security code shown on the screen in the appropriate field.
8. Agree to the "Terms and Conditions."
9. Click the link provided to access your DocLink Home Page.

Note: The Debtor Attorney must register before any staff member(s) may register.

1.2 LOGGING-IN TO DOCLINK FOR THE FIRST TIME

1. Access DocLink via the internet by navigating to https://doclink.bms7.com.
2. From the main website page, click on the "Login/Register" link or button.
3. Under the "Returning Users" heading, enter the User Name and Password that you created in step 1.1.
4. Enter the "Security Check" code. (The code is not case sensitive).
5. Click "Login".

Note: A link is provided if you forget your password. Click the link to have a temporary password emailed to you.

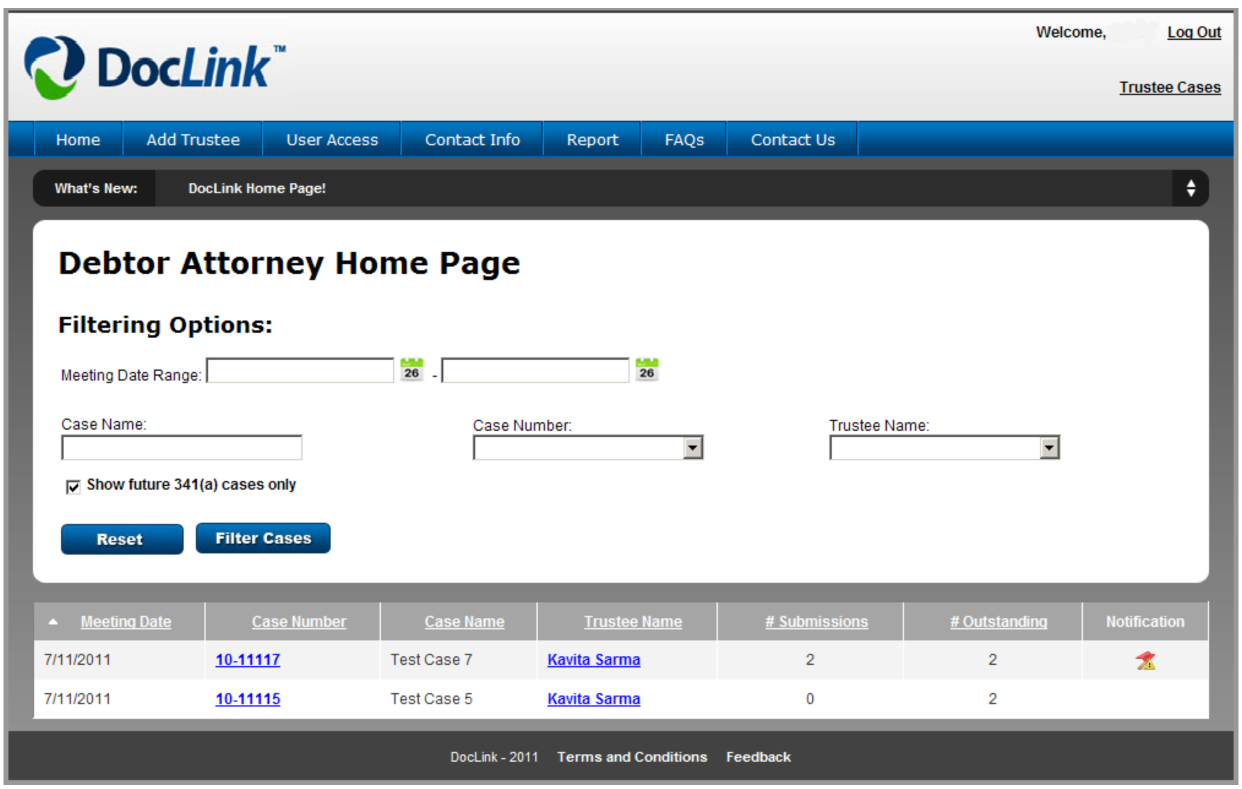


USING DOCLINK

2.0 DEBTOR ATTORNEY HOME PAGE

2.1 NAVIGATION

- The DocLink Debtor Attorney Home Page provides easy navigation to all of DocLink's functions. These functions can be found by clicking on any of the links in the blue navigation bar at the top of the screen.
- The "Home" link will return the user to this home page.
- The "What's New" panel displays messages from BMS on what's new in DocLink.
- The "Trustee Cases" link is displayed only for Debtor Attorneys who are also U.S. Trustees to navigate between Debtor Attorney and Trustee functions of DocLink.



2.2 USING THE DEBTOR ATTORNEY HOMEPAGE FUNCTIONS

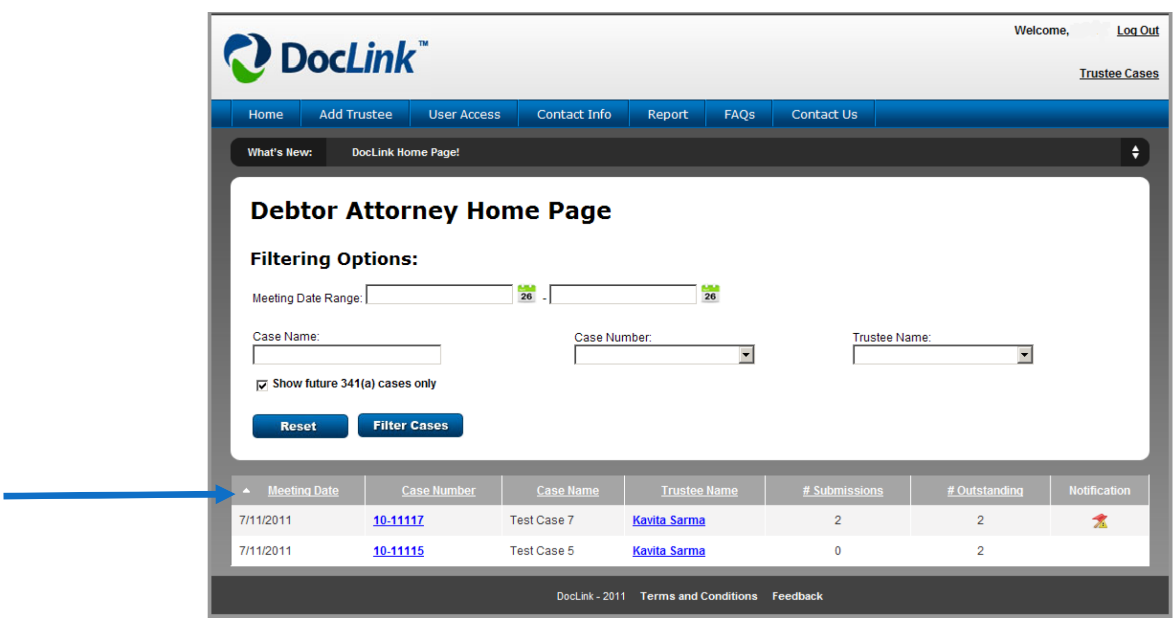
The Debtor Attorney Home Page in DocLink provides a list of upcoming 341(a) cases. Each case can be viewed by clicking on the blue-highlighted case number.

This list can be filtered to display only a specific range of cases using the “Filtering Options” at the top of the page. These options include:

- Enter a date range in MM/DD/YYYY format or click in the date field to select a date range.
- Enter a “Case Name” to see a specific case. You can enter partial names and see all cases that contain the partial name entered.
- Click the "Case Number" drop-down to browse for a specific case.
- Click the "Trustee Name" in the drop-down to see a list of cases for a specific Trustee.
- *Note: De-selecting the “show future 341(a) cases only” will allow the user to see cases which had a prior-scheduled meeting date.*

Clicking on the blue-highlighted "Trustee Names" in the list will open your local email program and begin an email to the Trustee. The email subject line is populated to identify it as an email from DocLink and contains the debtor attorney name, case number and case name.

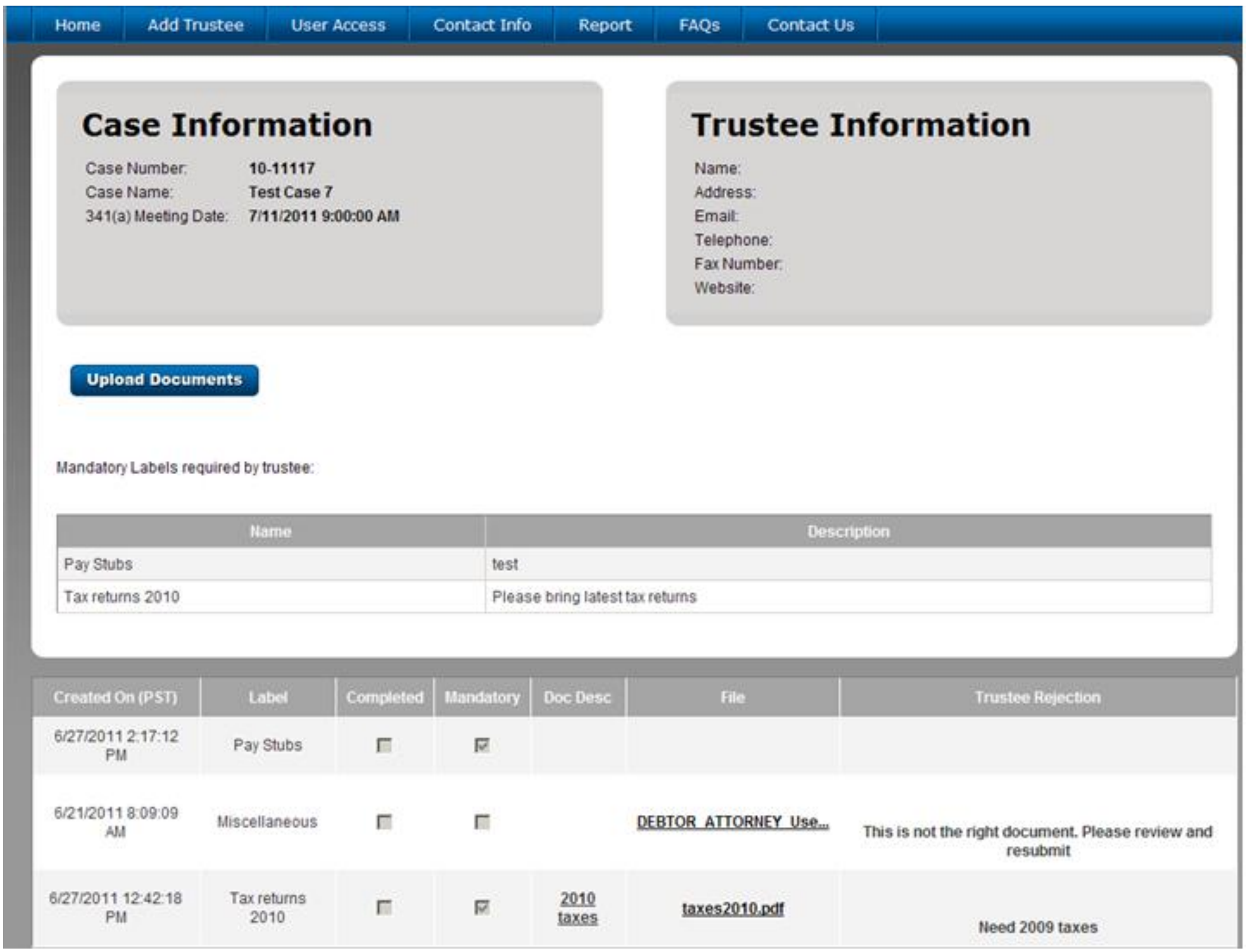
It is possible to sort the case list by clicking on a column header. Click the column header again to sort in the opposite direction.



3.0 MANAGING AND UPLOADING CASE DOCUMENTS

3.1 ACCESSING THE "CASE DETAILS" PAGE FOR A SPECIFIC CASE

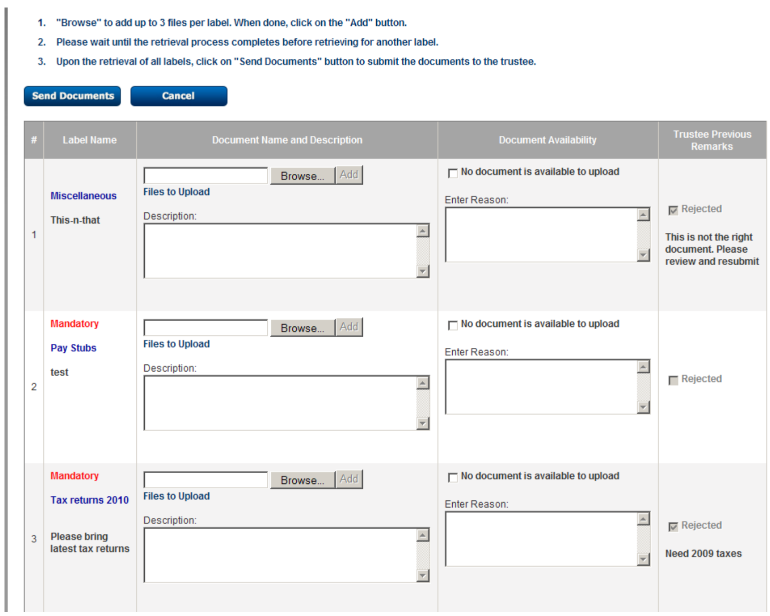
1. From the Debtor Attorney Homepage, either browse through the list of up-coming cases and/or use the "Filtering Options" to find the specific case you wish to view.
2. Once you have found that case, click on the blue-highlighted case number to open the "case details" page for the case.



3.2 UPLOADING DOCUMENTS TO A CASE

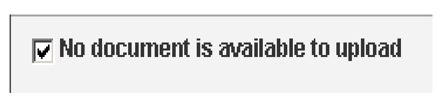
1. From the “Case Details” page, click the "Upload Documents” button.
2. Click "Browse" to navigate to the document(s) you wish to upload. You may upload up to three documents per label.
3. After selecting your document(s), click on the “Add” button to attach the document.
4. If desired, enter a description of the document being submitted.
5. Click the "Send Documents" button near the top of the page to load the documents and/or reasons to the Trustee's DocLink website.
   - *Tip: It is recommended that you right-click on the document and select “Open” on the right-click menu to review the document before selecting it for upload.*

- If you inadvertently choose an incorrect document, click the "Delete" button next to the corresponding document.



3.3 NO DOCUMENT AVAILABLE FOR A MANDATORY LABEL

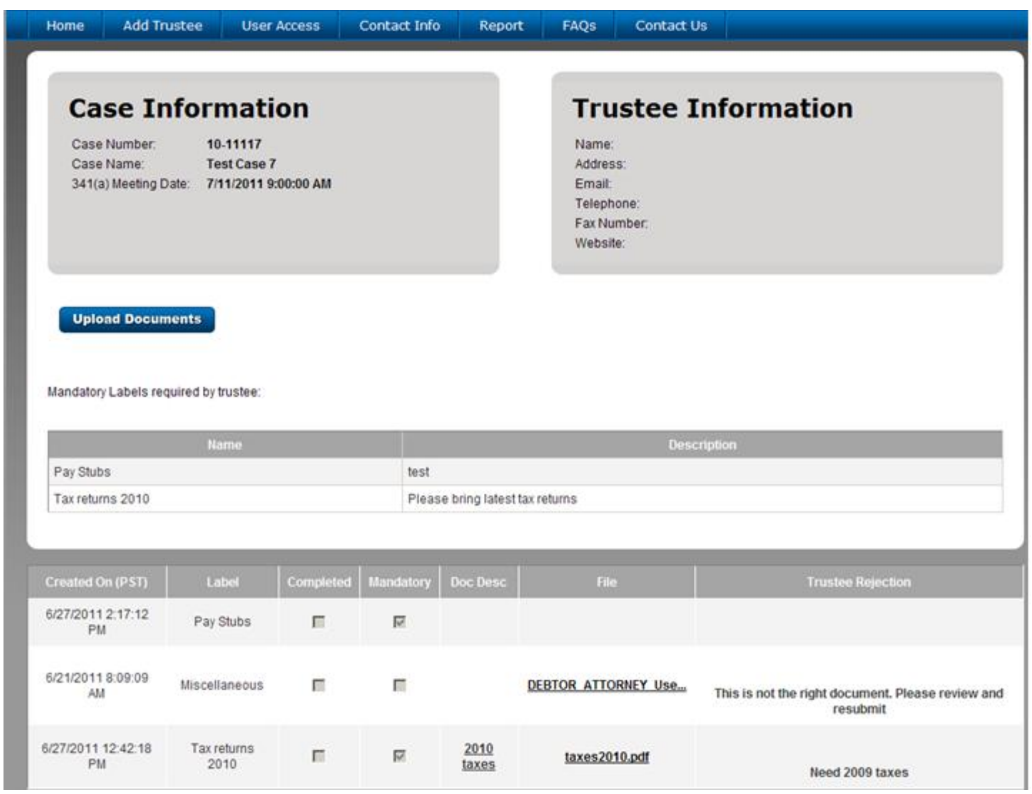
If there is no document available to upload for a specific Label:



1. Simply click the ‘No Document is available to upload’ check box.
2. Enter a description as to why a document is not being submitted for this field.
3. Click “Send Documents” to complete.

3.4 REVIEWING INFORMATION ON AND STATUS OF CASE DOCUMENTS:

- A list of documents previously submitted in the case is displayed at the bottom of the "Case Details" page for each case. All reported document upload times are based on the server time (Pacific Time).
- The "label" is the title of the document requested by the Trustee. The Trustee may have designated the document as a mandatory requirement.
- The "Completed" box will be checked if there was no document available to upload (see 3.3).
- In the "file" column, the name of the document is displayed. Click the file name to review the document.
    - *Note: After 30 days, the DocLink system removes the attached file from its servers for security purposes. The file name will still be displayed, but they will not be linked (document will be un-viewable).*
- The status of the Trustee's acceptance of the submitted document is displayed.
    - *Note: ALL documents are accepted by default.*
    - *Note: When a Trustee does not accept a document, you will be sent an email advising as such and will include the Trustee's notes as to why the document was not accepted.*



4.0 ADD TRUSTEE

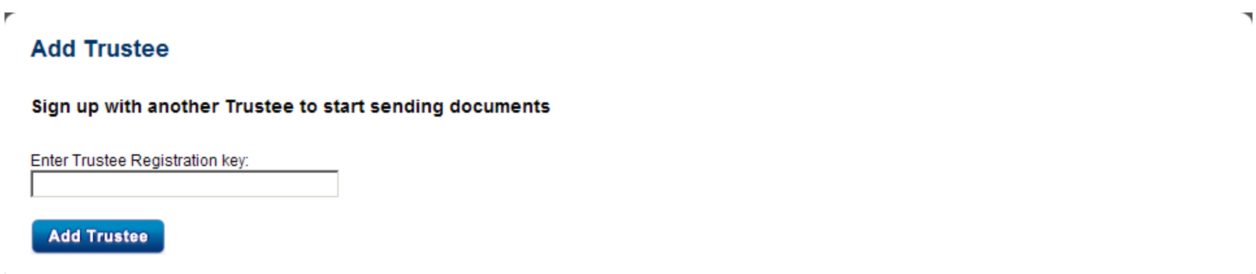
The “Add Trustee” page (found by clicking on the “Add Trustee” link in the blue navigation bar at the top of your screen) allows Debtor Attorneys to add additional Registration Keys from other Trustee with whom they are affiliated. This allows the Debtor Attorney to work with multiple Trustees without having to create a separate account for each one.

As of DocLink version 1.5.8, it is possible for staff members assigned by the Debtor Attorney to add trustees using this same method from their login.

4.1 TO ADD AN ADDITIONAL TRUSTEE

1. Click “Add Trustee” on the top navigation bar.

2. Type or cut-and-paste the additional Registration Key provided by the new Trustee into the field, then click “Add Trustee”.



3. The cases assigned to this Trustee will now appear in the Debtor Attorney’s Home Page.

5.0 USER ACCESS

The “User Access” screen allows the Debtor Attorney’s staff or other designated person to access the DocLink account.

5.1 HOW TO PROVIDE USER ACCESS

1. Forward the email message from the Trustee containing the Registration Key to your assistant or other designated party.
2. Your assistant or other designated party must complete the registration steps in section 1.1 of this guide.
3. Once your assistant or other designated party signs up with DocLink, The Debtor Attorney must then access the “User Access” page.
4. “Activate” the new user’s request for registration.
5. Once the registration is complete, your staff member or other designated party may log into DocLink and access all areas of your DocLink system.
    - *Note: Steps 3 and 4 MUST be completed above in order for Staff Members to receive access. If these steps are not completed, staff members attempting to log in will receive error message, “Your account must be approved by the primary account holder.”*

5.2 THE ‘OTHER EMAILS’ FIELD

This field allows the Debtor Attorney to add other email addresses to receive DocLink notifications. Separate email addresses using a semi-colon. The email addresses listed do not need to be email addresses that are registered with DocLink.

Receive Emails	Name	Email	Requested	Activated	Status
☑	John Eder	john.eder@bms7.com			
☐	Kent Stutzman	kent.stutzman@bms7.com	1/18/2011 4:39:34 PM	1/18/2011 4:40:50 PM	Active
☑	Other Emails	john.eder@bms7com;			
Save Cancel					

6.0 CONTACT INFO AND TRUSTEE INFO

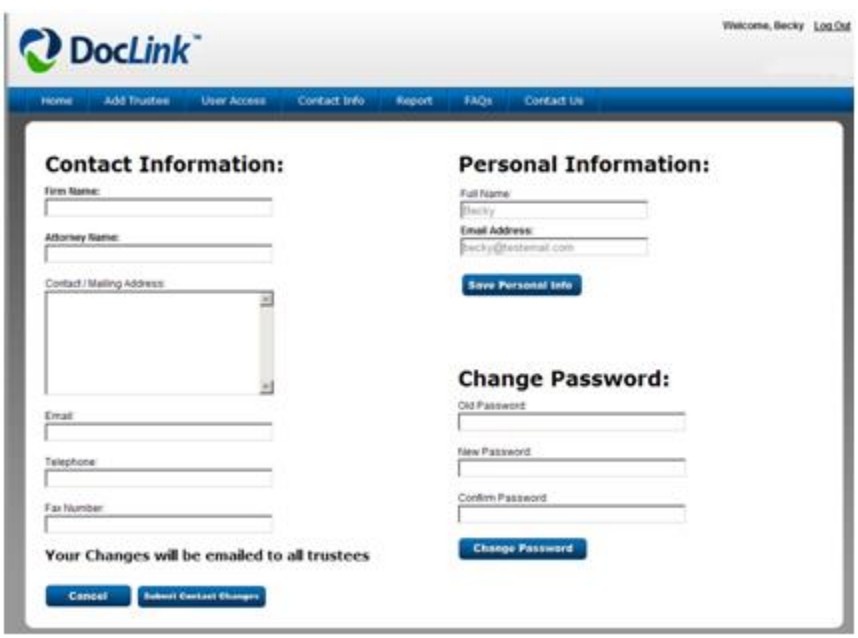
This screen allows the Debtor Attorney to maintain contact information or to change the DocLink password.

6.1 CHANGING CONTACT INFORMATION

1. Click "Contact Info" on the top navigation bar to access the Contact Info screen.
2. Add or revise personal contact information by typing the changes into the appropriate fields on the screen.
3. You may email changes in the “Contact Information” through DocLink by entering the changes into the appropriate fields on the screen, then clicking the “Submit Contact Changes” button.
4. An email is automatically sent to the Trustees for them to update the information.
   - *Note: Changes submitted to the Trustee must be updated by the Trustee in their CaseLink™ software. Until they are, the information in DocLink will not change. Note: The information maintained by the Trustee was populated with information from the Court to the Trustee’s CaseLink™ software.*

6.2 CHANGING PASSWORDS

1. Click "Contact Info" on the top navigation bar to access the Contact Info screen.
2. Change your DocLink password by typing in your old password, your new password, then re-enter your new password in the appropriate fields.
   - *Note: Passwords <u>are</u> case sensitive.*
3. Click "Change Password" to submit.

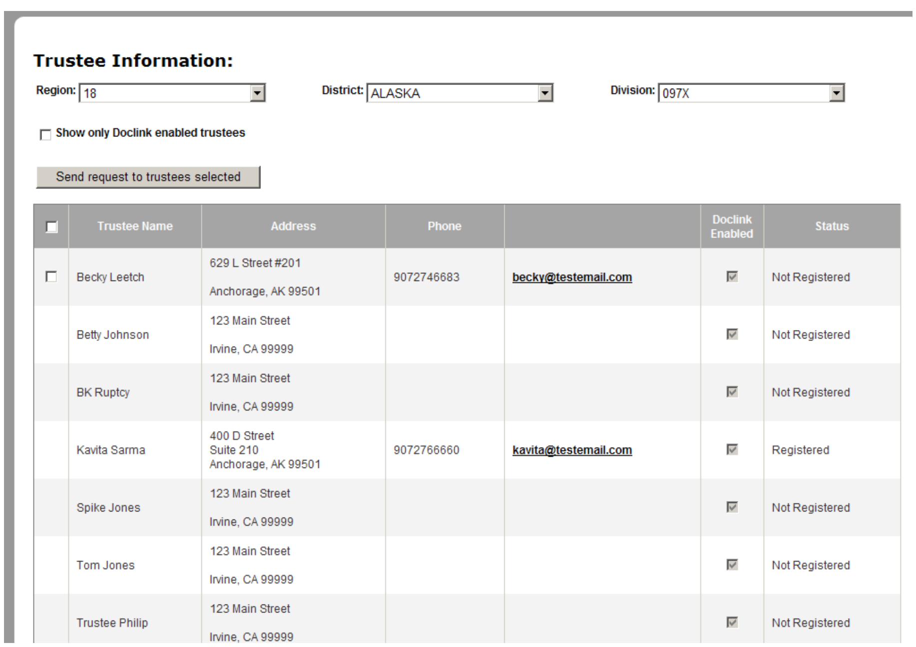


6.3 TRUSTEE INFO REQUEST

It is possible for Debtor Attorneys to request a Registration Key from a Trustee using DocLink or that a Trustee using CaseLink sign-on to use DocLink if they do not already. The Trustee Info Request page allows Debtor Attorneys to achieve both of these functions in a series of easy steps.

To Request a Trustee Registration Key:

1. In the “Contact Info” screen, scroll down to the “Trustee Information” section, located at the bottom of the page.
2. Using the drop-down menus provided, select the:
    a. Region
    b. District
    c. Division
3. The system will populate a list of Trustees in the Division who are currently using CaseLink. To connect with these Trustees, select the Trustees you wish to send messages to indicating that you are using DocLink and would like to add them to your system.
4. Once you’ve made the selections, click “send request to Selected Trustees”.
5. The email will be sent to the selected Trustees requesting a Registration Key.



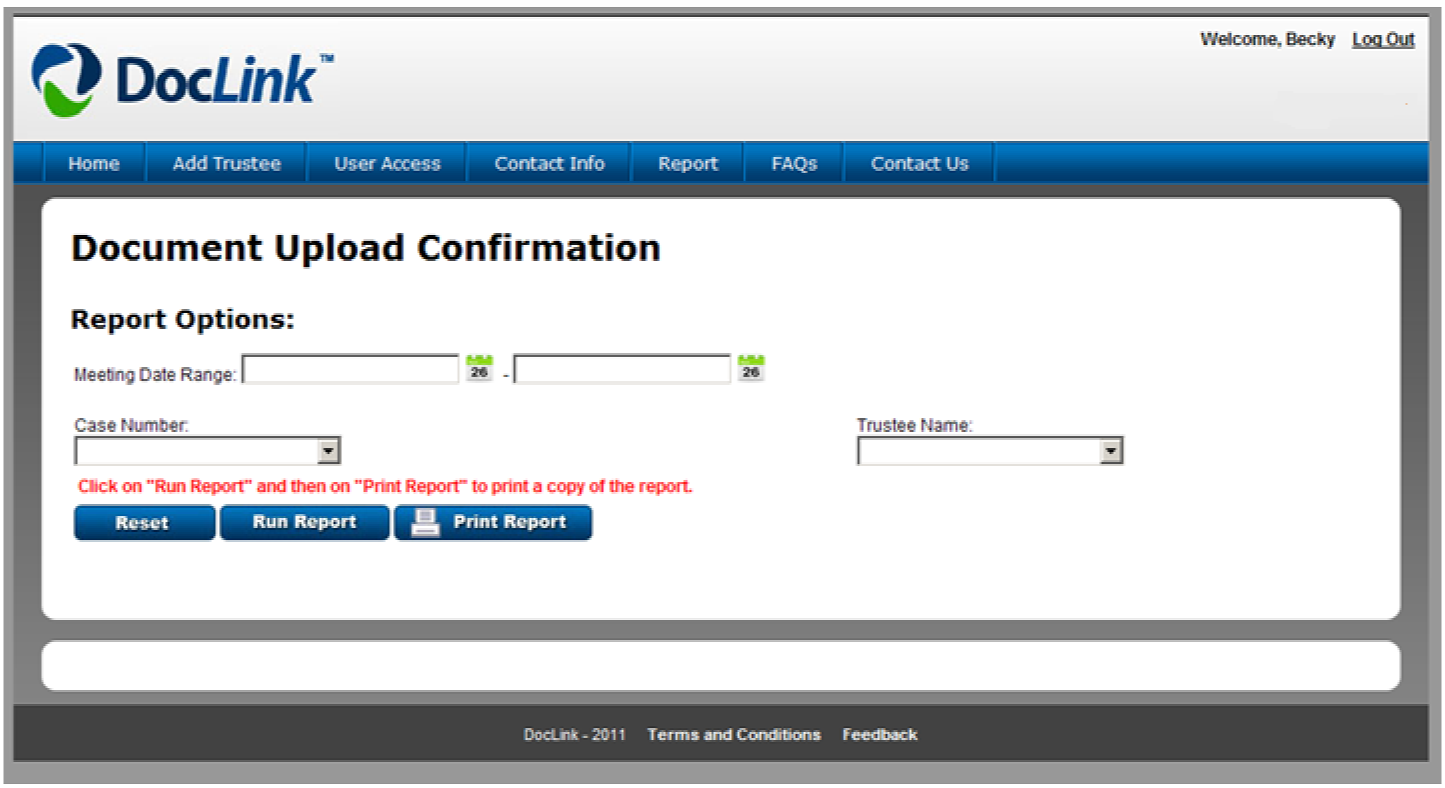
	Trustee Name	Address	Phone		Doclink Enabled	Status
	Becky Leetch	629 L Street #201 Anchorage, AK 99501	9072746683	becky@testemail.com		Not Registered
	Betty Johnson	123 Main Street Irvine, CA 99999				Not Registered
	BK Ruptcy	123 Main Street Irvine, CA 99999				Not Registered
	Kavita Sarma	400 D Street Suite 210 Anchorage, AK 99501	9072766660	kavita@testemail.com		Registered
	Spike Jones	123 Main Street Irvine, CA 99999				Not Registered
	Tom Jones	123 Main Street Irvine, CA 99999				Not Registered
	Trustee Philip	123 Main Street Irvine, CA 99999				Not Registered

7.0 REPORTS

The “Reports” page allows the user to create a report of confirmed document uploads for a specific case, specific Trustee or for a date range.

7.1 CREATING A DOCUMENT UPLOAD CONFIRMATION REPORT

1. Using the Report Options, select the date range, case number and/or Trustee Name that define the report you wish to create.



2. Click “Run Report”. The results will appear on your screen as shown below.

341a Date/Time	Case No.	Case Name	Trustee	Label Name	File Name	Date Uploaded	Mandatory
7/11/2011 9:00:00 AM	10-11117	Test Case 7	Larry Compton	Miscellaneous	DEBTOR_ATTORNEY_User_Guide_(External)v1.3.5.pdf	6/21/2011 8:09:09 AM	No
				Tax returns 2010	taxes2010.pdf	6/27/2011 12:42:18 PM	Yes

3. Once the report has generated, clicking “print report” will create a print-out of the selected report.

8.0 FAQ'S AND TROUBLESHOOTING

8.1 FREQUENTLY ASKED QUESTIONS

CREATING AN ACCOUNT

How do I register an account for the first time?
If you are an attorney, you'll need to request a registration key from your trustee to begin. Once you have the key, click the "Create an Account" link on the home page and follow the prompts. If you are a member of the attorney's staff, please get the registration key from your attorney. If you are a trustee or trustee's staff member, please contact your account manager.

What does the "Create an Account" link mean?
The "Create an Account" link is used by attorneys to sign up to use DocLink. Once a unique user ID/password has been created, attorneys can upload documents for their specific cases.

What is the difference between creating an account and entering a registration key?
Creating an account is a one-time signup process for attorneys. An account is your unique user ID and password. A registration key is needed to get started and establishes your relationship with a trustee.

I am a trustee. How do I login to use this Web site?
Please contact your account manager.

I work for an attorney in his/her office. How do I get access to the site?
In order to use the system, the attorney (himself/herself) must create an account first. If this has not occurred, then you will not be able to use the site. Start by creating an account; your request for access is put into a "pending" state. Once approved by your attorney, you will have access. You cannot register for the attorney; he or she must complete the registration process first. If you work for a number of attorneys, each one must complete this step.

What hardware or software do I need to use the Web site?
For optimum use of DocLink, you'll need a Windows-based system and Internet Explorer 8. Once your system meets these basic requirements, no additional hardware or software is required. DocLink will work with Internet Explorer versions 6, 7, and 8.

I have asked my admin to login and set up my account, but it's not working. Why not?
In order to use the system, a trustee must signup first. Once an account has been created, a trustee can then give access rights to other individuals.

Before I create an account, I have a question about some of the terms and conditions. What should I do?
The terms and conditions are important, and any questions related to them should be addressed. Contact your trustee if

you have any questions.

I can't remember if I signed up. What should I do?

Use the "Click here if you forgot your password" link on the login page. After entering your e-mail address, the system will attempt to locate your information. If you do not receive an e-mail, that indicates that information was not found and you'll need to start from the beginning; click the "Create an Account" link to begin.

REGISTRATION KEY

How do I get a registration key from a trustee?

Contact the trustee (by phone or e-mail) and request a registration key for DocLink.

There is something labeled "trustee registration key." Do I need that?

The trustee registration key is provided by trustees to attorneys. The key is entered by attorneys during the registration process and indicates a professional relationship. The key is confidential and should not be shared with anyone except any assistants in your office that you want to access your cases in DocLink.

The registration key provided by the trustee isn't working. What should I do?

Confirm that you are entering each character correctly. Pay particular attention to certain characters, namely, a "1" (vs. lowercase "l") and "0" (a zero character vs. an uppercase "O"). Another method is to "cut-and-paste" the key into the registration entry field. If you have entered the code correctly and still cannot register, contact the trustee to confirm the correct code was sent.

Other people in my office need to use the system. Can they use my registration key to get started?

As long as you are working with the same trustee, other individuals in your office can use your key. If you are establishing a relationship with a different trustee, you will need to request a new registration key specific to that trustee.

USER ID/PASSWORD

Where do I get a user ID and password?

You will create your user ID and password during the signup process. Attorneys need to enter a registration key provided by a trustee. If you are a trustee or trustee's staff member, please contact your account manager.

The login page opens, but my user ID or password isn't working. The screen says "login failed." What should I do?

This assumes that you have already registered and created a unique user ID and password. If this is your first time using this Web site, click the "Create an Account" to register. Start by confirming you have entered the correct spelling of your user ID and password. A single error, of course, will display the error message. Click the "forgot your password" link and retrieve a temporary password to login just in case your password is not exactly how you remembered it. If the new password does not work, use the "contact us" form and let us know your user ID. We will investigate the problem for you.

I forgot my password. Now what?

Look for the "Click here if you forgot your password" link. Once you click the link, a screen will appear asking for your e-mail address or user ID. Enter either item and click the "Reset Password" button. A temporary password will be sent to the email address on file. If you enter an e-mail address that does not exist in the system, the information will not be sent.

I need to change my user ID. How do I do that?
Once an account is created, the user ID cannot be changed.

I need to change my password. How do I do that?
Passwords can be changed from the "Contact Info" screen.

What does the security check box mean?
The security check box prevents hackers and other threats from getting access to the system. Using the keyboard, you need to enter a text version of the characters. Think of the box as an additional level of security protecting your information from outsiders.

BROWSER ISSUES

The login page opens, but my user ID or password isn't working. The screen says "login failed." What should I do?
This assumes that you have already registered and created a unique user ID and password. If this is your first time using this Web site, click the "Create an Account" to register. Start by confirming you have entered the correct spelling of your user ID and password. A single error, of course, will display the error message. Click the "forgot your password" link and retrieve a temporary password to login just in case your password is not exactly how you remembered it. If the new password does not work, use the "contact us" form and let us know your user ID. We will investigate the problem for you.

I forgot my password. Now what?
Look for the "Click here if you forgot your password" link. Once you click the link, a screen will appear asking for your e-mail address or user ID. Enter either item and click the "Reset Password" button. A temporary password will be sent to the e-mail address on file. If you enter an e-mail address that does not exist in the system, the information will not be sent.

I need to change my user ID. How do I do that?
Once an account is created, the user ID cannot be changed.

I need to change my password. How do I do that?
Passwords can be changed from the "Contact Info" screen.

What does the security check box mean?
The security check box prevents hackers and other threats from getting access to the system. Using the keyboard, you need to enter a text version of the characters. Think of the box as an additional level of security protecting your information from outsiders.

I am using Internet Explorer 9, but I can't get this Web site to work. What is wrong?
The only approved browser at this time is Internet Explorer 8. Users are advised NOT to install or use Internet Explorer 9 to avoid compatibility issues.

I am using Firefox, but I can't get this Web site to work. What is wrong?
While some versions of Firefox may work with DocLink, the only approved browser at this time is Internet Explorer 8. Users are advised to install Internet Explorer 8 (free from Microsoft) to avoid compatibility issues.

I am using Chrome, but I can't get this Web site to work. What is wrong?
While some versions of Chrome may work with DocLink, the only approved browser at this time is Internet Explorer 8. Users are advised to install Internet Explorer 8 (free from Microsoft) to avoid compatibility issues.

I am using Safari, but I can't get this Web site to work. What is wrong?
Safari was designed by Apple Computer and is part of the Macintosh operating system. While some versions of Safari may work with DocLink, the only approved browser at this time is Internet Explorer 8, running on a Windows-based system. Users are advised to install Internet Explorer 8 (free from Microsoft) to avoid compatibility issues.

My anti-virus software is blocking access to the Web site. What should I do?
To use the Web site, you need continuous Internet access. If your anti-virus program is preventing you from using the site, or is regularly prompting you with "are-you-sure?" type messages, you should add the site to the list of trusted locations. Consult the software publisher or search for specific instructions relating to "granting access."

Can I use my smartphone to access the site?
DocLink was not designed for smartphones. While you may be able to view certain screens, it is likely many of the site features will not work on a portable device. As a result, you should not attempt to use a smartphone to access the site.

MANAGING DOCUMENTS

How do I upload a document?
From the home page, click on the appropriate case number. On the case screen, click "Upload Documents". A new page will open, allowing you to load files. Start by selecting the items to upload. To upload tax returns, for example, click the "Browse" button in the "tax returns" row. Locate the document by browsing through your folders. After the document filename appears, click "Retrieve". You can upload an additional two (2) documents per label. Click the "Upload Documents below" button to upload the files.

I need to upload a document for a case, but the case number isn't visible. What can I do?
Cases are generated by the trustee. Are you looking at the proper trustee for that case? Does the case have a past 341(a) meeting date? Go back to the home page, and use the filter option to locate the case. If the case does not appear in the list, contact the trustee assigned to that case for further assistance.

I have a new version of a document that's already been uploaded. How do I update it?
Resubmit the file. The system allows multiple submissions per item. For example, the first time you used the system you submitted a tax return that was only partially complete. Login a second time and upload the new tax return.

What does "document availability" mean when I am uploading a document?
If you have no documents to upload for a particular label (e.g. tax returns), you can let the trustee know this. Check the box "No document is available to upload" and enter the reason why there is no file. This tells the trustee that you understand what has been requested (tax returns in the previous example), but that you have no documents to submit. It is only recommended that you do this for labels that are marked as 'Mandatory'.

How do I delete a document?
Once a document has been uploaded, it cannot be deleted. If you are in the process of selecting files for upload, click "cancel upload".

I received a message that a document was not accepted. What should I do?
Read the error message carefully to determine the cause of the issue. If further information is needed, contact the trustee.

I uploaded a pay stub, but called it "tax returns" by mistake. How do I fix that?
Upload the document a second time with the correct classification. That is, upload the pay stub in the "pay stub" label. You also need to load the appropriate "tax return" document to clear the mistake. If there is no "tax return" and you want to clear the prior mistake, you must create a .pdf file that states "no file submitted". Upload this .pdf file under "tax return" with a description that indicates the error.

I am trying to upload a spreadsheet (.xls file), but it's not working. What should I do?
Only .pdf files can be uploaded. Portable Document Format (.pdf) files are created using the Adobe Acrobat application. Go to http://www.adobe.com for more information.

I am uploading documents, but the filename is displayed below the name box. What's wrong?
In some cases, rapid clicking of files (and the upload button) will result in the filename appearing below the name box. The file will upload correctly once the "Upload Documents" button is clicked.

Can I view an uploaded document?
Yes, using the detailed case information screen, double-click the filename of the uploaded document. This will open the document. If the document is not hyper-linked, this means that the document was securely deleted and it cannot be opened.

My system is trying to open a .pdf file, but it's not working. What should I do?
In order to open a .pdf file, you must have Adobe Acrobat Reader installed on your system. The software is free; go to http://www.adobe.com for more information.

Can I see all the documents I have uploaded for a particular trustee?
Yes and no. On the case detailed information page, a list of all documents per case, per trustee is displayed. There is no direct method of seeing all the documents uploaded for a trustee.

Can I see all the documents I have uploaded for a particular case?
Yes, using the case detailed information page, a list of all documents uploaded for a selected case is displayed.

Can I print a report of documents that have been uploaded to DocLink?
Yes. Along the top navagation bar, click 'Reports' and 'Upload Confirmation'. This will allow you run a report either by meeting date (date range), case number or by Trustee name. You can either preview or print the results.

Can I change the order of cases appearing on the home page?
Yes, use the filtering option at the top of the page to limit the amount of data displayed. You can also click on the column headings, which will re-sort the list in ascending or descending order. For example, if you click "Meeting Date", cases will appear in current-to-future date order. If you click "Meeting Date" a second time, the cases will appear in future-to-current

order. The system remembers your last sort request.

What happens if I click on a case number on the home page?
You will be directed to another page that displays the details of that particular case, the trustee information, the document types the trustee is requesting (including those identified as "mandatory"), and the documents already sent to the trustee.

I can't see a particular case. Why not?
Go to the home page and use the filter option to locate the case. If the case does not appear, you must contact the trustee associated with the case and ask them to load the case in CaseLink. Cases can only be loaded by a trustee.

How do I change my company's name in the system?
You cannot change your company's name directly. Click "Contact Info" on the navigation bar and enter the new information. This information is e-mailed to each trustee shown below your information and only they can make the change.

How long are documents stored on DocLink?
Documents and cases are stored on DocLink for 60 days after the latest 341(a) date or until the case has been discharged. Securely deleted documents will still show that they were once uploaded, but they will not be hyper-linked.

ACCOUNT ADMINISTRATION

How do I change my company's contact mailing address?
You cannot change your company's mailing address directly. Click "Contact Info" on the navigation bar and enter the new information. This information is e-mailed to each trustee shown below your information and only they can make the change.

How do I change my company's contact e-mail address?
You cannot change your company's e-mail address directly. Click "Contact Info" on the navigation bar and enter the new information. This information is e-mailed to each trustee shown below your information and only they can make the change.

How do I change my company's contact phone number?
You cannot change your phone number directly. Click "Contact Info" on the navigation bar and enter the new information. This information is e-mailed to each trustee shown below your information and only they can make the change.

How do I change my company's contact fax number?
You cannot change your fax number directly. Click "Contact Info" on the navigation bar and enter the new information. This information is e-mailed to each trustee shown below your information and only they can make the change.

How do I change my password?
Click "Contact Info" on the top navigation bar and enter your new password.

MY ACCOUNT

Does the registration key for one trustee work for another trustee?
No. The system issues one registration key per trustee. You must register using each trustee's unique key to have access to your cases with that trustee. To add a new trustee, click "Add Trustee" on the top navigation bar.

How do I sign up with another trustee?
If you are an existing user, click "Add Trustee" on the top navigation bar. Enter the registration key for that trustee.

How do I terminate my relationship with a trustee?
Contact the trustee and let them know that you no longer want to use the Web site.

How do I close my account?
Contact the trustee and let them know that you no longer want to use the Web site.

I think my account may have been closed. How do I sign up again?
Contact the trustee for a new registration key and sign up again.

How do I authorize my admin assistant to upload documents?
Forward the e-mail from the trustee (containing the registration key) to your admin. Have the admin create an account using his or her unique user ID, password, and e-mail address. Next, as the Attorney, log in to DocLink and click "User Access" on the top navigation bar. Locate your admin's name and activate his or her account.

8.2 ADDITIONAL HELP

If you have questions that have not been answered in this Guide or need assistance with Troubleshooting a problem, please refer to the comprehensive FAQ's (Frequently Asked Questions) section of the website, https://doclink.bms7.com. Specific words or phrases can be found using your browser's search function (e.g. Ctrl+ F in Internet Explorer 8).

9.0 CONTACT US

9.1 CONTACT US

Use the "Contact Us" link in Doclink to submit questions not answered by this document or the DocLink FAQs. Include as much detail as possible. All inquiries will receive a response.